

# Coordination of Pollution Prevention Resource Exchange (P2Rx) Network Quarterly Report – August 2011

U.S. EPA Grant X9-83451601-0

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the Pacific Northwest Pollution Prevention Resource Center*

August 31, 2011

The following quarterly report is submitted in compliance with the reporting requirements of U.S. EPA Grant X9-83451601-0.

Since mid-March 2010, the Pacific Northwest Pollution Prevention Resource Center (PPRC) has been coordinating the work of the Pollution Prevention Resource Exchange (P2Rx), a network of eight regional pollution prevention information centers (hereinafter referred to as “the centers”) that provide pollution prevention and source reduction information, networking opportunities, training and other services to states, local governments, businesses, technical assistance providers, and others in their regions and nationwide.

Coordination of P2Rx falls into three broad categories: collaboration, marketing and partnership, and measurement. Work in these categories is described below. This report concludes with a brief summary of project budget expenditures and status.

This report covers activities conducted from February – August 2011. PPRC served as Coordinator from February – March 2011 at which point the National Pollution Prevention Roundtable (NPPR) took over as Coordinator. From April 2011 to August 29, 2011, PPRC completed work on various projects, but did not serve as Coordinator, nor did it conduct routine tasks.

In the interest of conserving paper, site addresses have been provided for reports and, when possible, summaries that are found on-line.

## **Collaboration**

“Collaboration” describes activities that enhance coordination and collaboration among the centers. February and March were heavily oriented toward the strategic planning meeting in February. March was also focused on the transition and case study work. After March, Sten did not participate in any administrative monthly conference calls or P2Rx meetings.

## **Calls and meetings**

### P2Rx Administrative Monthly Calls

Meeting minutes for the Administrative meetings are posted by date under “Previous Admin Calls Minutes” at <http://p2rx.org/webcall/getadmingroup.cfm>. Major topics discussed during this period included strategic planning, partnership development, NING site development, marketing and program updates.

The P2Rx Directors met by conference call on February 9, 2011 and March 9, 2011. The summary documents are found on the P2Rx Administrative site at

<http://p2rx.org/webcall/webcallminutes/admincall110209.pdf> and  
<http://p2rx.org/webcall/webcallminutes/adminCall110309.pdf> .

## Committees

Strategic Plan A considerable amount of work in February went into the strategic planning meeting. Because preparation for the meeting was largely done by committee, it is addressed in this section. Committees that met prior to the meeting by conference call included the Executive Committee, the Content and Technology Committee and the Marketing and Partnership Committee. In addition to committee work, previous surveys, white papers and conversations supported the planning and discussions.

The meeting was held in Seattle, Washington at EPA Region 10 offices. All centers but ESRC attended. We attempted to include ESRC by conference call, but it proved to be very inconvenient and was discontinued after the first day. The next Coordinator's team at NPPR attended. NPPR took notes which are found in Appendix A. The notes are not as important as the summary chart of initiatives considered and adopted and/or rejected found in Appendix B.

Marketing and Partnership During this period, the Marketing and Partnership Committee was engaged in two main activities:

1. Donna Walden of WSPPN and Chair of the Marketing and Partnership Committee, led the committee in rigorous discussions related to umbrella messaging, branding and mission statement. At the strategic planning meeting, Walden rolled out the issues for discussion by all centers. The centers revised the mission statement and discussed branding issues. They decided not to rebrand the organization but to re-infuse pollution prevention into discussions. Because the marketing plan was finalized after the strategic planning meeting and after PPRC's tenure as Coordinator, Donna Walden should be consulted for the final document.

### Communications with EPA.

Beth Anderson, serves as a representative from EPA Headquarters. She routinely participates on monthly Admin conference calls unless the topics covered represent a conflict of interest and participated in the Strategic Planning Meeting.

In February and March, P2Rx was contacted to see what we had to add to the Regional Coordinators' monthly call.

February	P2Rx declined due to strategic planning meeting.	
March	Laura Barnes	Social media and the new P2Rx Social Media Plan

### **Routine Maintenance Functions Associated with Collaboration**

Several routine maintenance functions were performed by the Coordinator team in February and March. These are described below.

Provided web support The P2Rx home website was maintained and updated, including P2 content and links provided to clients and the administrative pages that contain minutes, standards, Coordinator reports, user manuals, marketing materials and other information for the centers. NEWMOA is handling much of the IT work for P2Rx including tasks resulting from the

centralization of the Topic Hub database, the P2 Programs Directory, and P2 News. NEWMOA responds routinely to IT questions raised by individual centers. They are helping Zero Waste Network and PPRC with their pop up features.

Checked programs directory and Topic Hub links.

Centers continue to receive a monthly reminder of web links that need to be fixed. (Link-checking procedures are posted at <http://p2rx.org/admininfo/LinkChecks-P2Rx.pdf>.)

**Summary of routine coordination activities taking place during February and March 2011.**

February	<ul style="list-style-type: none"> <li>• Set agenda for admin call; sent reminder one week in advance</li> </ul>
	<ul style="list-style-type: none"> <li>• Conducted admin call (2/9/10); prepared and posted minutes (Although the request was made, the minutes were not posted until August.)</li> </ul>
	<ul style="list-style-type: none"> <li>• Sent Strategic Planning meeting summary e-card to Regional Coordinators</li> </ul>
	<ul style="list-style-type: none"> <li>• Checked and fixed links for Topic Hubs</li> </ul>
	<ul style="list-style-type: none"> <li>• Checked and fixed links Programs Directory</li> </ul>
	<ul style="list-style-type: none"> <li>• Cancelled slot on Regional Coordinators call due to conflict with P2Rx Strategic Planning meeting</li> </ul>
	<ul style="list-style-type: none"> <li>• Posted Executive Committee-approved videos onto P2Rx Home site</li> </ul>
March	<ul style="list-style-type: none"> <li>• Set agenda for admin call; sent reminder one week in advance</li> </ul>
	<ul style="list-style-type: none"> <li>• Conducted admin call (3/9/10). Prepared and posted minutes.</li> </ul>
	<ul style="list-style-type: none"> <li>• Set up monthly call for Regional Coordinators. Laura Barnes provided an overview of social media and covered the newly adopted social media strategy.</li> </ul>
	<ul style="list-style-type: none"> <li>• Checked and fixed links for Programs Directory</li> </ul>
	<ul style="list-style-type: none"> <li>• Posted Executive Committee-approved videos onto P2Rx Home site</li> </ul>
April -	<ul style="list-style-type: none"> <li>• Turned over routine tasks to NPPR</li> </ul>
	<ul style="list-style-type: none"> <li>• Posted information on call lines and arranged to post information on website for first quarter 2011 admin and web group conference calls.</li> </ul>

**Marketing and Partnership**

Broadly, “Marketing and Partnership” includes, but is not limited to, outreach activities that increase the reach of P2Rx. Our objectives for this area of work are twofold: increase use and relevance of P2Rx products and develop partnerships with organizations with similar purpose.

Mission Statement, Umbrella Statement, and Branding The work of the Marketing and Partnership Committee on mission statement, umbrella statement and branding was described above.

NING The Marketing and Partnership Committee was heavily involved with the NING site roll out.

Partnership Outreach. The centers are working on a Partnership Strategy. This strategy was discussed at the Annual Meeting in Orlando, with defined next steps. The purpose of the strategy is to identify partners and areas of joint interest that should increase P2Rx reach, relevance and, eventually, funding. The transition to a new Coordinator made it inappropriate to continue some of the outreach initially planned.

*Regional P2 Coordinators.* EPA’s Regional P2 Coordinators (P2 Coordinators) are important P2Rx partners. More diverse and less cohesive than the centers, they manage the PPIN funding vehicles and are well connected in their regional offices and throughout their regions. During this period:

The Coordinators’ Workgroup that was reviewing P2Rx addressed the centers at the Strategic Planning Meeting via conference call.

Laura Barnes discussed social media and the new social media plan at the March Regional Coordinators’ conference call.

*Department of Defense.* Sten and WSPPN worked on the development of a webinar on implementation of Executive Order 13514 which addresses sustainability, green house gas emissions, green procurement and energy conservation at federal facilities. At the end of March, this effort was left to WSPPN.

*DC meeting follow up.* In November, Sten went to Washington, DC to meet with candidate partners. Follow up to these meetings conducted February through August is described below:

<b>Meeting</b>	<b>Feb-March activity</b>	<b>Suggested next steps</b>
Case Study meeting	<p>Modified the case study section of the P2Rx home page to include other organizations with case studies.</p> <p>Notified the case study providers of the modifications.</p> <p>Researched and developed three reports on case study formats and providers to support discussions on future improvements. These reports are found in Appendix C.</p> <p>Shared the reports with PPRC, ZeroWaste Network and Office of Innovation. Recommended that a meeting of the case study providers be set up to discuss the possibility of standardizing formats to increase utility and sharing. Like E3 metrics, common areas of interest could be identified and collected.</p>	Last Communication on case studies was in August when Sten turned the work over to PPRC, ZeroWaste and EPA’s Office of Innovation (Mitch Kidwell).
E3	Continued the discussion with Tom Murray on use of P2Rx to provide institutional memory for E3	Continue the dialog. Establish a relationship with INEAP through Tom Murray and E3.

	projects.  Developed factsheet for MEPs and E3 projects. See Appendix D.	
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**New formats:** Sten worked with Smilebox to produce e-cards that would be more interesting than reports for partners. One e-card summarized the Strategic Planning meeting. This card was sent to Regional Coordinators for their review. A second e-card gave recipients a heads up on upcoming events at P2Rx. Reviews of the e-card approach were mixed. Surprisingly, among the centers, there was a noticeable gender split on whether the cards were liked. Men seem more sensitive to music choices. The Coordinators seemed to like the e-card, but it caused one Regional Coordinator's computer to crash. Finding new formats does seem to be a productive endeavor. It is efficient, attractive and eye catching. Care should be taken to ensure that the product looks professional.

### Transition Work

The Coordination staff has performed the following tasks that should smooth the transition to the new Coordinator in 2011. The final transition document is found in Appendix E.

### Coordinator Review

The Centers reviewed the Coordinator and the Coordination team and their roles using Survey Monkey. The results are found in Appendix F.

### Measurement

No quarterly report or semi-annual report information was gathered by PPRC during this period. The centers discussed the semi-annual report during their February conference call. Points raised included:

- Data inconsistencies. Centers are using a variety of tracking mechanisms which results in inconsistencies in the data. The data is not valuable if it is not tracked in a consistent manner. These inconsistencies make the information compiled unreliable for comparing the centers. Data is only valuable to individual centers.
- There should be a discussion on what is counted and what is not counted (e.g. meetings v. PPIN-funded meetings).
- Centers should talk with their project officers regarding what should be counted.
- Headquarters attributes 10% of P2 Results to P2Rx.
- Should the centers centralize data collection and have it all on the same platform?
- Common questions. Very little data was collected on common questions. Centers commented on issues associated with common questions.
  - PPRC (Region 10) uses common questions only for people very close to PPRC such as Board members and state P2 coordinators. Once the data was collected, PPRC saw little value to returning to the same people. They do not anticipate collecting the data more than one a year.

- P2RIC (Region 7) used the common questions at the Regional Roundtable meeting. This is the only time they received responses. They did have a problem this year with their static link and are working on it.
- Zero Waste Network (Region 5) has had technical difficulties with their pop ups. They hand them out to Regional Roundtable members. Website users may not understand the questions. When common questions were handed out at conferences, the feedback was “strange”.

Actions suggested included:

- The centers should discuss what is counted and what is not counted (e.g. meetings v. PPIN-funded meetings) to increase consistency.
- Centers should consult with their project officers regarding what should be counted.
- The centers should discuss whether or not to centralize data collection on one platform.

Unfortunately, measurement was not discussed in detail at the strategic planning meeting. These suggestions should be addressed at some point to make the measurement more meaningful.

## Project Budget Expenditures and Status

Expenditures and budget status through August 31, 2011 are summarized below. Since September 2010 budget numbers were not available for the last quarterly report (March-Sept 2010), they are included here. Additional details are available upon request.

### Budget for P2RX Coordinator

	<b>Budget</b>	<b>Mar-Aug 2010</b>	<b>Sept 2010</b>	<b>Oct 2010</b>	<b>Nov 2010</b>	<b>Dec 2010</b>	<b>Jan 2011</b>	<b>Total to Date</b>	<b>Remaining Balance</b>
Personnel	\$ 57,962	\$ 21,985	\$ 2,677	\$ 4,679	\$ 3,698	\$ 4,911	\$ 5,970	\$43,919	\$14,043
Fringe	\$ 6,074	\$ 3,516	\$ 427	\$ 749	\$ 592	\$ 785	\$ 955	\$ 7,024	\$ (950)
<b>Total Personnel</b>	<b>\$ 64,036</b>	<b>\$ 25,501</b>	<b>\$ 3,104</b>	<b>\$ 5,428</b>	<b>\$ 4,290</b>	<b>\$ 5,696</b>	<b>\$ 6,925</b>	<b>\$50,942</b>	<b>\$13,094</b>
Travel	\$ 4,800	\$ 1,949	\$ (549)			\$ 1,975	\$ 9	\$ 3,383	\$ 1,417
Equipment	\$ -	\$ -						\$ -	\$ -
Supplies	\$ 125	\$ -				\$ 90		\$ 90	\$ 35
Contractual	\$ 17,500	\$ 128				\$ 8,043		\$ 8,171	\$ 9,330

Other Direct Costs	\$ 4,337	\$ 345			\$ 45	\$ 150		\$ 540	\$ 3,797
<b>Total Direct</b>	<b>\$ 26,762</b>	<b>\$ 2,421</b>	<b>\$ (549)</b>	<b>\$ -</b>	<b>\$ 45</b>	<b>\$10,258</b>	<b>\$ 9</b>	<b>\$12,184</b>	<b>\$14,578</b>
<i>Indirect</i>	<i>\$ 24,203</i>	<i>\$ 13,548</i>	<i>\$ 1,651</i>	<i>\$ 2,884</i>	<i>\$ 2,279</i>	<i>\$ 3,026</i>	<i>\$ 3,679</i>	<i>\$27,067</i>	<i>\$(2,864)</i>
<b>Total Federal Request</b>	<b>\$ 115,000</b>	<b>\$ 41,470</b>	<b>\$ 4,205</b>	<b>\$ 8,312</b>	<b>\$ 6,614</b>	<b>\$18,980</b>	<b>\$10,613</b>	<b>\$90,193</b>	<b>\$24,807</b>
Grand Total	\$ 121,001								\$30,808
Match	\$ 6,001							\$ -	\$ 6,001

## Appendix A. Notes taken by NPPR at the P2Rx Strategic Planning Meeting

### P2Rx Meeting Notes Tuesday, February 15, 2011

#### What is P2Rx good at?

##### P2Ric

###### *Strengths:*

- Sustain updates
- Social media advocacy
  - Developing new tools
- Grants

###### *Weaknesses:*

- Personal contacts
  - Development opportunity

##### WSSPN

###### *Strengths:*

- Annual regional conference
  - Review of plan, found that conference is still needed
- Webinars
  - 200 attendees
- Hospitality Topic Hub
- Social Media
  - Facebook, Twitter
- Constant contact
  - Monthly newsletter
- EPP collaborative
  - Industrial contract
    - Point system increase for green

###### *Weaknesses:*

- Not connected enough
- Continue marketing
- Website – support measures
- Web platform

##### ESRC

###### *Strengths:*

- Library
- Webinars
  - Hospitality
- Videos on YouTube

- Google driving usage of site
- Working on cutting webinars into shorter talks

*Weaknesses:*

- Things change
- More difficult to focus with new tech.
- Rapid Response
  - Not contacted anymore. People Googling stuff more and decline in State programs.
    - Need to rethink usage of Rapid Response
- Not doing social media

ZWN

*Strengths: Core*

- Case studies
- Organizing regional workgroups, webinars
- Collecting outcomes from regional progress
- Working with NPPR and other groups

*Strengths: Center*

- Training
- P2 Planner (1000 options)
- Environmental outcomes
- Social media – Twitter, Facebook, Linked In, Delicious, regular updates
- Direct Technical assistance
- Partnership within larger organization

*Weaknesses:*

- Too many things
- State programs falling apart, P2 not a recognized term
- P2 in general, not high on the list with programs, unknowns to many
  - Sustainability
  - Lean
  - Green

PPRC

*Core:*

- Roundtable
- Training
  - Spray training
- P2 News
- Social Media
  - Linked in page 160 people on it
- Climate change Topic Hub
- Facilitation with other groups
- Lean and Green Workgroup
  - About 50 – 60 on webinars

*Focus:*

- Climate change
- Carbon reduction

- Green house counting
- Needs Assessment report
  - What tools business things they need to reduce carbon

*Weaknesses:*

- Website Redesign needed
  - Some tools are broken
    - Still getting Rapid Response questions, this is broke
    - Search function is broke

GLPPR

*Strengths:*

- P2 News
- List serves
- Social networking
- Sustainable electronics
- Sustainability session then putting on website
  - Held at ISTC
- Hospitality
- Technical Assistance
- Research Lab

*Weaknesses:*

- Staffing
- Website update needed
- Not talking to states enough, state groups breaking apart
- No conference in a while, due to travel restrictions

NEWMOA

*Strengths:*

- NING
  - Collaborate to bring resources together nationally around topic
- Metrics to create transparency in Hospitality through NING (P2 Results)
- Emerging technologies to solid referrals on technologies
- Virtual vendor fair
  - Wet cleaning
    - Community around adopting technologies
- Aligning what do to what is important to the state, very connected with states
  - Annual survey
  - States working on Hospitality, GHG, wet cleaning

Peaks

*Strengths:*

1. Collaboration and Networking
  - Healthy Schools
  - Tribal
  - Local government
  - 15 webinars a year

2. Website and maintaining it
  - Green building
3. Weatherization – Connecting to other University training
  - Mobile weatherization teams go all over country
  - Healthy homes training

*Weaknesses:*

- Social media
- Advocacy roles haven't taken on
  
- Looking forward to working with other centers, leveraging opportunities

\*Centers have a combined of over 425 years of P2 experience

**Core Competencies for all Centers**

- Information Distribution
- Training and Education
- Convene
- Grant Funding
- Needs Assessment
  - Customers
  - Trend tracking – Topics and delivery mechanism relevant
  - Measurement
- P2 Promotion

**Marketing and Partnership Committee (HANDOUT)**

- Looking at messages and still relevant
  - Used for:
    - Technical assistance providers
    - Government
- What are audiences
  - End Users

Proposed New Mission Statement (in Handout)

Proposed statement:

Positive – More action oriented

Negative – Sustainability versus Pollution Prevention

- Prevention tide to sustainability
- Prevention as cornerstone of sustainability

- Networking is used twice
- Are core competencies embraced?
- How does behavior change fit in mission?
- Add sustainable economy, builds community, reports benefits
- Work force development
- Should Goals and Objectives be in Mission Statement?

## **EPA P2 Coordinator Workgroup - HANDOUT**

Why not working together better?

Did not know a lot about P2Rx, educated selves on P2Rx

Drawing on Page 2

- How information is gathered?
- Moves through network to headquarters to where it can be turned to tools to bring back to local
- Full cycle of P2 information

Rob Guilleman – On street effort, turn around from old bottom down approach  
- P2Rx is in a good place for strategic role with that

Pam Swingle – Recommendations in Report

- Survey monkey of regional coordinators
  1. Utilize centers
  2. Value of centers
  3. Could they live without centers
  4. Gap to knowledge of national and what other centers do
  5. What are roles of centers? Other than the regional one

### Biggest Challenges

- State and EPA budgets
- Lack of communication nationally
  - E.g. webinars
- EPA and coordinators bigger role in communication
  - E.g. grant process

### Recommendations in Handout

- Central Center IT communication
- Redefine roles and responsibilities
- Centers role in national system
- EPA interaction with states
- Social Networking tool
  - What marking through them?
- What centers expect of EPA
- **Better Communication**
- **National Coordination** – Biggest

### Sustainability

- P2Rx unique to tackling challenges

### Internal Challenges

- Centers have Regional focus, rather than national focus
- Marketing and rebranding of P2Rx

- Think large
- Coordinator activities, systemize, disseminate nationally
- Notion of network and created partners
- Grow and strengthen connections

RFP – End of February/Early March

- 2 Years
- Collaboration in it

#### Rebranding/Repackaging

- Green Business Assistance - Instead of P2?
- Sustainability?

National Academy of Sciences report

- Information on their website
- Mid-year draft due April/May
- ECOS communicates with NSA, Steve Owens, and Annes
  - Cross-Media

#### Next Steps

- Marketing group to look into Rebranding and Naming
- What does centralized IT mean?
  - National webinar calendar?
  - Expertise listed by region?
  - Why 8 sites?
  - Look at current model
  - How to address unmet needs
  - Have a clear picture of what is settled on
- Define sustainability/P2 discussion – Where/how to engage
- NAS – Contacting lead investigator and asking about
  - ECOS cross-media committee
  - Timeline and engagement

### **Working Lunch with NPPR**

#### NPPR Focus

- Membership services
  - Toxics Challenge to bring in industry
- P2 Results Data System
- Better to strategically position
  - NPPR handle Region 3 database
  - Stakeholder dialogue/engagement
    - Content providers
- TASCAs Reform
  - P2Rx role
- Workforce development/training

- Workgroup support
- Centralization of services
  - IT related
- NPPR workgroup re-examination
- Opportunities with PPD strategic plan
- Quarterly joint NPPR/P2Rx Executive Committee meetings
  - Part of P2Rx Administration calls

**Who is our customer?**

Funders – Funding to non-funding customers

Co-opptioners – NGO’s, Trade Associations, other EPA offices, state agencies, other P2 centers, Google/Bing, NPPR, librarians, Universities

Non-Funders – States, schools, business, general public, students, tribes, EPA, military

Getting to audience funders can’t get to

Ins and outs of customers/audience

*Characteristics:*

1. Lone voice (seeking education and network)
2. Catalyst
3. Advocates
4. Multi-Taskers
  - a. Practical
  - b. Impatient
5. Low Cost
6. Low Risk
7. “Have a problem” – What is the question
8. Seeking Recognition

*Categories (x – take off)*

- Need it now
- Want information for it’s own sake - **x**
- Not interested
- Scooping a problem
- Just listening to the conversation - **x**
- Influencers – strategic and personal

**Future Trends (Refer to Handout)**

**Bill Dunbar – EPA/P2 Funding**

- Need industry stories
  - Facts, data, and success stories
- Huge funding reductions in White House and House Republicans budgets

Wednesday, February 16, 2011

## Marketing and Partnership Committee

### Audiences:

- TAPS
- End Users
- General Public
- EPA

### Products:

- Rapid Response
- Webinars
- Listservs
- P2 Results
- Program Directory
  - How to leverage?
  - Update
  - What should be in here?
- Social Bookmarking
- P2 Info House
- Regional Roundtable Conferences
- P2 Tribal
- Topic Hubs
- Calendar
- P2 News
- NING
- Social Media
- Case Studies

### Initiative

1. Rebranding
  - a. Recommend tag line
  - b. Committee will support surveys as an initial part of rebranding
  - c. Recommend that funding be allocated toward rebranding

### *Products*

2. Rapid Response
  - a. Core?
  - b. How to make more robust and collaborative?
3. Webinars
  - a. Consistent branding
  - b. Master calendar – coordination
  - c. Bundling
4. P2 Results

- a. Promote P2 thru results
  - b. Create plan for marketing
  - c. Match with success stories
- 5. Programs Directory
  - a. How to use for leverage
  - b. What should be in here
  - c. Collection policy
- 6. P2 Info House
  - a. Explore merge with EPA's PPIC or other
- 7. Print Calendar
  - a. Replacement product and outreach
    - i. Smilebox (ecard generator)
      - 1. Sent to Center Directors once a month
  - b. Collection policy
- 8. Topic Hubs
  - a. Discuss different platforms
  - b. Subcommittee decide what to do
  - c. Relevancy
  - d. Possible exit strategy
- 9. Video Library
  - a. Launch
  - b. Presentation archiving (format)
  - c. Collection policy
  - d. Plan
- 10. Social Media
  - a. Merge with P2 News?
  - b. Recommend standards/strategies
  - c. Add to umbrella messaging?
  - d. Track retweets?
  - e. P2Rx Site: Track what's being tweeted by centers
  - f. P2Rx page on Facebook
  - g. Include common hash tags
  - h. YouTube Channel
  - i. Deliberate conversation about strategy branding, etc.
- 11. Case Studies, Success Stories, Testimonials
  - a. Develop templates
  - b. Propose become core product
  - c. How to compile
  - d. Make it core
  - e. Tie to video
  - f. Bundle with measurements
  - g. Funding?

## **Strategic Initiatives (HANDOUT)**

Thursday, February 18, 2011

## RFP Priorities for 2011

### WSPPN

- Continued web support from NEWMOA
- Work with NEMOA on NING
- EPP collaboration working with Paula to go national
  - Exploratory mode
- Do some nationwide webinars
  - Broaden scopes to national on sustainability/working with Myla
- Continue update Topic Hubs
  - Hospitality
  - Auto
- Continue with Roundtables
  - Funding up in the area

### PPRC

- Continue to offer Rapid Response
- Moving to two categories
  - E3/GHG Reduction/Climate Change*
    - Talking to Carolyn about things to be done on E3
    - Building expertise on GHG
    - Staff expanding knowledge on energy efficiency
  - Toxic Reduction*
    - Working with Ken Zarker
    - Green Chemistry Roundtable
    - Storm water management in Puget Storm
- Doing Roundtable
  - October doing strategic planning

### GLPPR

- Social networking
- News
- Looking funding on Hospitality
- Sustainable Electronics Initiative lost funding, working on getting it back as P2 initiative

### P2ric

- Continue Rapid Response
- Continue conversation on new social medias
- Social media sand box
  - Try out new

- Engaging business and sustainability
  - Developing curriculum
- SBA energy efficiency
- Work with College of Public Health and Nebraska
  - Environmental Health
- Measures and indicators

### ZWN

- Case Studies
  - Myla, Laura, and Michelle, NPPR members, NPPR Marketing Group
- Workshop
- E3 Training and Grants available
  - Department of Labor
- 3 day course under OSHA
  - Risk under P2

### NEWMOA

- Grow and faster – NING
  - April 1
- Hospitality metrics work
  - Behavior changes – environmental outcomes
- Platform changes
- Social media
- P2 Results
  - Centralized
    - Come back with Timeline and Plan
    - Results back to regional sites?

### Peaks

- FTE – how much time of core functions
- Tribal P2 network to create more network for expertise mentoring program
  - Facilitating training/mentoring
    - Making connections
- Success Stories
  - Green local government
    - Create new section on green local government
      - Matrix way of looking at IT
    - Online Guide Book
- E3
  - Helping states figure out how to
    - Conversation
- Roundtable meeting

Appendix B. P2Rx Strategic Planning Meeting Summary Chart

**P2Rx**  
**2011-2015 Strategic Initiatives**  
*Adopted February 2011*

<b>Initiative</b>	<b>Time</b>	<b>Success means . . .</b>
Topic Hubs <ul style="list-style-type: none"> <li>• Form Subcommittee headed by Andy Bray to decide on what to do with Topic Hubs with a possible exit strategy</li> </ul>	Before 2011 proposals submitted	<ul style="list-style-type: none"> <li>• Decision on topic hubs</li> </ul>
Calendar <ul style="list-style-type: none"> <li>• Collection Policy</li> <li>• Month by month calendar</li> </ul>	Short Term	<ul style="list-style-type: none"> <li>• Collection Policy</li> <li>• Month by month calendar</li> </ul>
P2 InfoHouse <ul style="list-style-type: none"> <li>• Discussion with ESRC on the future of P2Infohouse with report back to the Centers (Rick)</li> </ul>	Short Term	<ul style="list-style-type: none"> <li>• Decision on what to do with P2InfoHouse</li> </ul>
Case Study /Success stories <ul style="list-style-type: none"> <li>• Develop templates</li> <li>• Improve current database</li> <li>• Tie to videos</li> </ul>	Medium Term	<ul style="list-style-type: none"> <li>• \$200,000 in funding for case study database</li> <li>• Increase contributions</li> <li>• Increase partners</li> </ul>
Video library plan	Short term	<ul style="list-style-type: none"> <li>• Plan</li> </ul>
New Video Library <ul style="list-style-type: none"> <li>• Template</li> <li>• Collection policy</li> <li>• Archives</li> <li>• Plan</li> </ul>	Medium term	<ul style="list-style-type: none"> <li>• Library with a collection policy, template for additions and archives</li> </ul>
Platform resource upgrade <ul style="list-style-type: none"> <li>• Information discovery</li> <li>• Distribution</li> <li>• Off the shelf</li> <li>• Evaluation of current research on platforms</li> <li>• Survey of centers</li> <li>• Spec needs</li> <li>• Evaluate available tools</li> <li>• Implement</li> </ul>	Long term	<ul style="list-style-type: none"> <li>• Decision on transitioning/ upgrading Cold Fusion</li> </ul>
Use Social Media more effectively:	Long term	<ul style="list-style-type: none"> <li>• Implementation of a</li> </ul>

<ul style="list-style-type: none"> <li>• Adopt plan</li> <li>• Merge P2 News and Social Media</li> <li>• Message discipline</li> <li>• Linked In</li> <li>• Track center tweets</li> <li>• Facebook page</li> <li>• Conversation about deliberate and strategic use of social media</li> <li>• Need to address both pushing information out and what to do when it turns into a dialogue</li> <li>• Editorial policy</li> <li>• Metrics</li> </ul>		<p>strategic social media plan</p> <ul style="list-style-type: none"> <li>• Decision on P2News and Social media</li> <li>• Uniform umbrella messaging adhered to</li> <li>• Editorial policy</li> <li>• Facebook page</li> <li>• Metrics will measure change</li> <li>• Increase in number of P2Results contributors</li> </ul>
Adopt hash tags	Short term	Hash tags used
Continue to build relationship with P2 Coordinators	Short term	Continued involvement on monthly calls, inclusion of
Include Mottley and strategically selected individuals on distribution lists	Short term	Inclusion of strategically selected EPA staff on distribution lists
Solicit information from EPA to distribute throughout P2Rx	Short term	Examples of inclusion of EPA in round robin discussions and on calls, as appropriate
Consistent branding for webinars	Short term	NOT ADOPTED
Re-evaluate rapid response to make it more robust and collaborative	Short term	NOT ADOPTED
Look into Rebranding	Long term	NOT ADOPTED
Program Directories Collection policy	Short term	NOT ADOPTED

Notes:

- Long term initiatives have a 5-year horizon.
- Mid-term initiatives have a 3-year horizon which goes to the end of the next funding cycle (2013).
- Short term initiatives should be completed within the current funding cycle (Fall 2011).
- Very short term initiatives are initiatives which may be completed by Summer 2011.

Appendix F. Case study report: **Review of Case Study Databases & Collections**

**Review of Case Study Databases & Collections**  
**April 4, 2011**

**Case Study Search Strategy**

An internet search was completed to identify possible sources of industrial case studies in pollution prevention, energy and water efficiency, lean manufacturing and sustainability. The search strategy included a keyword approach, including terms such as: “case study”, “success story”, “technical assistance program”, “pollution prevention”; with .edu, .org, .mil.gov; intitle:”case study” with lean, manufacturing, energy, environment, “pollution prevention”, etc. An attempt was also made to separately identify industry and trade association websites that might have case study materials.

**General Impressions of Case Study Examples**

1. Many case studies and success stories were identified. Case studies are generally multi-page documents with more detail while success stories are usually shorter, one-page documents with less detail.
2. Both true databases and list-of-links “collections” often mix case studies, success stories, resource documents and links to resources under one moniker without distinction. This makes quantifying case studies a challenge on many sites.
3. Case studies at most websites come from the heyday of P2 in the mid-late 1990s and early 2000s. This suggests that an age restriction before the mid-2000s (to limit inclusion of older, perhaps out-of-date studies) would eliminate a large majority of existing case studies in pollution prevention.
4. There are likely some significant, unidentified trade association/industry databases. Some of these sites require paid membership for access; an example is the compliance assistance center for chemical manufacturers at <http://www.chemalliance.org/>.
5. There may be an opportunity to combine case studies from EPA-funded compliance assistance centers with P2Rx: see <http://www.assistancecenters.net/>
6. There may be an opportunity to use P2Rx as a central repository for the many small collections of P2 case studies found at state environmental agencies and university-based manufacturing assistance programs.
7. Some large international databases (see below) include excellent, relevant case study examples.

**Case Study Sources Identified for this Study**

The objective of the case study search was to find significant sources of case studies available via the internet. The identified sources were grouped into four categories: 1) US case study collections, 2) international case study collections, 3) Department of Energy case study collections and 4) miscellaneous collections of interest.

**US Case Study Databases** (includes only large collections; does not include Zero-Waste or P2Pays)

<b>1</b>	<b>Organization</b>	National Compliance Assistance Centers
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www.assistancecenters.net/">http://www.assistancecenters.net/</a> Links may be found here to a variety of sector based websites.
	<b>Description</b>	Seventeen separate sector-based centers with websites focused on environmental compliance, e.g., the Printers' National Environmental Assistance Center, <a href="http://www.pneac.org/">http://www.pneac.org/</a> . Resources at this site include mostly fact sheets and resource documents but also some case studies. No true databases here, but among the full 17 organizations, there are likely many case studies.
	<b>Search</b>	Basic site searching only.
	<b>Notes</b>	These centers are partially sponsored by EPA ( <a href="http://www.epa.gov/oecaerth/assistance/centers/index.html">http://www.epa.gov/oecaerth/assistance/centers/index.html</a> ) and managed by the National Center for Manufacturing Sciences ( <a href="http://www.ncms.org/index.php/programs/sustainable-manufacturing/">http://www.ncms.org/index.php/programs/sustainable-manufacturing/</a> ). The individual centers are run by separate organizations ( <a href="http://www.assistancecenters.net/about.cfm">http://www.assistancecenters.net/about.cfm</a> ). There may be an opportunity to consolidate case studies from these centers or partner with the managing organization to cross-list resources. These centers also partner with a number of manufacturers' and trade associations that may be interested in collaboration on pollution prevention, energy efficiency, lean manufacturing, etc.
<b>2</b>	<b>Organization</b>	Toxics Use Reduction Institute
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www.turi.org/content/view/full/4307//year//month//day/">http://www.turi.org/content/view/full/4307//year//month//day/</a>
	<b>Description</b>	91 case studies primarily involving chemical use, safer alternatives and toxics reduction. 1990-2008. ~1000 words. Includes Massachusetts Office of Technical Assistance projects. Not a true database, but a set of web pages with abstracts and links to case study pdf files.
	<b>Search</b>	The site provides an Excel spreadsheet that identifies case studies by date and methods employed.
	<b>Notes</b>	Good quality documents with photographs and detailed information.
<b>3</b>	<b>Organization</b>	ICLEI Local Governments for Sustainability
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www.iclei.org/index.php?id=1139">http://www.iclei.org/index.php?id=1139</a>
	<b>Description</b>	A mix of US and international case studies in energy efficiency, water efficiency and broader sustainability work; mix of municipal and public sector projects (~125 case studies). Not a true database, but a list of links.
	<b>Search</b>	No search capability beyond a global site search.
	<b>Notes</b>	Access may require membership for some studies.
<b>4</b>	<b>Organization</b>	NIST Hollings Manufacturing Extension Partnership
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://blue.nist.gov/sshome">http://blue.nist.gov/sshome</a>
	<b>Description</b>	Very large collection of ~300-800 word success stories from 2007 to 2010.

	<b>Search</b>	By keyword or by one of either industry, state, MEP center, or district code(?)
	<b>Notes</b>	Site has a clean, efficient layout, basic search, and potential to sort results by year. There are MEP case studies at the individual MEP websites that are not catalogued in the NIST database.

**International Case Study Sources** (results include all significant sources identified)

<b>1</b>	<b>Organization</b>	Australian Government, Department of Sustainability, Environment, Water, Population and Communities
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www.environment.gov.au/archive/settlements/industry/corporate/eecp/industry.html">http://www.environment.gov.au/archive/settlements/industry/corporate/eecp/industry.html</a>
	<b>Description</b>	~1000 words, 1988-2002. Collection of over 185 Australian “Eco-efficiency & Cleaner Production” case studies show how companies can reduce production costs, save resources, reduce waste and maintain a competitive edge. The case studies are designed to give small to medium sized businesses easy access to information on how to improve their methods of production.
	<b>Search</b>	Links organized by Australian and New Zealand Standard Industrial Classification (ANZSIC) Divisions
	<b>Notes</b>	Page header includes a disclaimer suggesting the studies may be dated and some internal study links no longer available (though a sample of case studies opened with no issues).
<b>2</b>	<b>Organization</b>	BusinessCare – a non-profit trust in New Zealand. BusinessCare's focus is on promoting, supporting and encouraging the implementation of sustainable management and cleaner production practices by local SME businesses nationwide.
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www.businesscare.org.nz/casestudies/index.asp">http://www.businesscare.org.nz/casestudies/index.asp</a> Working case link: <a href="http://www.businesscare.org.nz/material/casestudies/c2764_3.html">http://www.businesscare.org.nz/material/casestudies/c2764_3.html</a>
	<b>Description</b>	~1000+ words, 1980s-2000s. Collection of hundreds of case studies, but most links fail. May overlap with Australian website above, but includes additional New Zealand work.
	<b>Search</b>	Links organized sector; studies searchable by sector or topic (cleaner production, water, energy, Divisions)
	<b>Notes</b>	Many broken links, but most are from a few major case study sources (suggests may be fixable??)
<b>3</b>	<b>Organization</b>	WRAP (Waste & Resources Action Programme)
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://envirowise.wrap.org.uk/uk/Our-Services/Publications.html">http://envirowise.wrap.org.uk/uk/Our-Services/Publications.html</a>
	<b>Description</b>	120+, high-production value case studies, from recent 2000s; ~1500 words.
	<b>Search</b>	Advanced search (at the above link) includes country (within UK), sector, issue (water, EMS, etc.)
	<b>Notes</b>	Case studies available as PDF download or HTML, however, the HTML requires a login/password while the PDFs download without additional steps/login (free). Video case studies also available.
<b>4</b>	<b>Organization</b>	Dalhousie University Eco-Efficiency Center

	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://eco-efficiency.management.dal.ca/Publications_%26_Resources/Case_Studies.php">http://eco-efficiency.management.dal.ca/Publications_%26_Resources/Case_Studies.php</a>
	<b>Description</b>	16 case studies (~500 words) plus 60+ success stories (one-pagers), from recent 2000s;.
	<b>Search</b>	Success stories organized by year.
	<b>Notes</b>	Overlaps with CPPIC below.
<b>5</b>	<b>Organization</b>	Environment Canada
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www.ec.gc.ca/p2/default.asp?lang=En&amp;n=860DE9C8-1">http://www.ec.gc.ca/p2/default.asp?lang=En&amp;n=860DE9C8-1</a>
	<b>Description</b>	Approximately 30 “success stories” of varying length from the late 1990s to the present.
	<b>Search</b>	Links to story webpages organized by name and P2 type.
	<b>Notes</b>	
<b>6</b>	<b>Organization</b>	Toronto Region Sustainability Program
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www.trsp.ca/case_studies.htm">http://www.trsp.ca/case_studies.htm</a>
	<b>Description</b>	37 case studies from a variety of industries.
	<b>Search</b>	No search, but a list of links by industrial sector.
	<b>Notes</b>	Covered in database at CPPIC below.
<b>7</b>	<b>Organization</b>	Canadian Pollution Prevention Information Clearinghouse (CPPIC)
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www.ec.gc.ca/cppic/En/index.cfm">http://www.ec.gc.ca/cppic/En/index.cfm</a>
	<b>Description</b>	Database of Pollution prevention case study links to third-party external websites in the US and Canada (ala our much-loved “Topic Hubs”).
	<b>Search</b>	Can search by sectors and keywords. Case studies lumped with reports. “More like this...” search feature appears with individual case study results.
	<b>Notes</b>	A keyword search on “case study” returned over 600 hits. No significant vetting of these results.

### Department of Energy Case Studies

<b>1</b>	<b>Organization</b>	Office of Health, Safety and Security – Pollution Prevention Best Practices Database
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://homer.ornl.gov/nuclearsafety/p211/">http://homer.ornl.gov/nuclearsafety/p211/</a>
	<b>Description</b>	Well over 100 success stories in pollution prevention from across the federal sector.
	<b>Search</b>	Searchable by keyword, year, operation/activity (nine categories, e.g., waste management, fleet management, production and process operations, etc.)

	<b>Notes</b>	Database housed at Oak Ridge National Laboratory.
<b>2</b>	<b>Organization</b>	Industrial Assessment Centers Database
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www1.eere.energy.gov/femp/program/waterefficiency_csstudies.html">http://www1.eere.energy.gov/femp/program/waterefficiency_csstudies.html</a>
	<b>Description</b>	The Industrial Assessment Centers (IAC) Database is a collection of all the publicly available assessment and recommendation data (approximately 15,000 assessments). This information includes type of facility assessed (size, industry, energy usage, etc.) and details of resulting recommendations (type, energy & dollars savings etc.). The results are presented as tables of recommendations with the associated cost, benefit and energy data. <b>There is no narrative</b> to discuss the facility's physical description or any information that would specifically identify the company or problem solving approach.
	<b>Search</b>	The Database can be searched by: <ul style="list-style-type: none"> <li>• Assessments: Industry Type, Size, Year, Energy Costs, Products</li> <li>• Recommendations: Type, Savings, Cost, Implemented</li> <li>• Industry Type: SIC and NAICS</li> </ul>
	<b>Notes</b>	
<b>3</b>	<b>Organization</b>	Industrial Technologies Program – Best Practices /Case Studies
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www1.eere.energy.gov/industry/bestpractices/case_studies_industry.html">http://www1.eere.energy.gov/industry/bestpractices/case_studies_industry.html</a>
	<b>Description</b>	Approximately 100 case studies describing energy improvement projects, process improvement projects, and/or assessments at the plant level. These case studies are approximately ten years old (somewhat older than the other DOE energy stories found in this study).
	<b>Search</b>	Links to PDFs organized by industry group.
	<b>Notes</b>	Somewhat older than the Save Energy Now studies below.
<b>4</b>	<b>Organization</b>	Industrial Technologies Program – Case Studies and Success Stories
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www1.eere.energy.gov/industry/saveenergynow/case_studies.html">http://www1.eere.energy.gov/industry/saveenergynow/case_studies.html</a>
	<b>Description</b>	Twelve case studies on energy efficiency, available as PDFs, approx., 4 pp. These case studies and success stories highlight energy savings achieved by companies that have participated in Save Energy Now energy assessments and used Industrial Technologies Program software tools to improve energy efficiency.
	<b>Search</b>	Clickable categories sort the collection by company name, industry type, system area (e.g., compressed air, pumps, fans, steam, etc.), data centers and utilities.
	<b>Notes</b>	Studies are good examples of effective case study design.
<b>5</b>	<b>Organization</b>	Industrial Technologies Program – Save Energy Now Leader Companies
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www1.eere.energy.gov/femp/program/waterefficiency_csstudies.html">http://www1.eere.energy.gov/femp/program/waterefficiency_csstudies.html</a>

	<b>Description</b>	Ten case studies on energy assessments at LEADER companies (companies that commit to 25% reductions in ten years). These assessments identify energy-savings opportunities with a significant return on investment.
	<b>Search</b>	Basic site search only.
	<b>Notes</b>	
<b>6</b>	<b>Organization</b>	Federal Energy Management Program – Water Efficiency Case Studies
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www1.eere.energy.gov/femp/program/waterefficiency_csstudies.html">http://www1.eere.energy.gov/femp/program/waterefficiency_csstudies.html</a>
	<b>Description</b>	Eleven case studies provide information about the performance, economics, and/or success of Federal water efficiency projects.
	<b>Search</b>	Basic site search only.
	<b>Notes</b>	
<b>7</b>	<b>Organization</b>	Federal Energy Management Program – Sustainable Building Case Studies
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www1.eere.energy.gov/femp/program/sustainable_casestudies.html">http://www1.eere.energy.gov/femp/program/sustainable_casestudies.html</a>
	<b>Description</b>	Includes six case studies on showcase sustainable buildings and seven reports on greening initiatives for federal sites (including energy efficiency, etc.)
	<b>Search</b>	Only basic site search capability.
	<b>Notes</b>	
<b>8</b>	<b>Organization</b>	Federal Energy Management Program – Utilities Contract Case Studies
	<b>Contact Info</b>	
	<b>Link</b>	<a href="http://www1.eere.energy.gov/femp/financing/uesc_case_studies.html">http://www1.eere.energy.gov/femp/financing/uesc_case_studies.html</a>
	<b>Description</b>	Thirteen case studies showcasing utility energy service contract (UESC) projects conducted by Federal agencies.
	<b>Search</b>	Only basic site search capability.
	<b>Notes</b>	
<b>9</b>	<b>Organization</b>	Office of Industrial Technology (superseded?) – Pollution Prevention Technology Case Studies
	<b>Contact Info</b>	
	<b>Link</b>	Found via Google search string: site:eeIindom1.ee.doe.gov/OIT/oitpdf.nsf "success story"
	<b>Description</b>	Ten to twenty success stories demonstrating technologies contributing to pollution prevention and energy efficiency.
	<b>Search</b>	.
	<b>Notes</b>	These stories are “somewhere” in the DOE system, but no directly linkable webpage home could be found for the documents. They were perhaps developed in an obsolete part of the DOE structure. The Google search string will bring up a group of studies, including, for example, this one on hydrochloric acid recovery systems: <a href="http://eeIindom1.ee.doe.gov/OIT/oitpdf.nsf/Files/beta.pdf/\$file/beta.pdf">http://eeIindom1.ee.doe.gov/OIT/oitpdf.nsf/Files/beta.pdf/\$file/beta.pdf</a>

## Miscellaneous Case Study Sources

1. Energy STAR case studies:  
[http://www.energystar.gov/index.cfm?c=fixtures.pr\\_showroom\\_casestudies](http://www.energystar.gov/index.cfm?c=fixtures.pr_showroom_casestudies)
2. Energy block grant success stories: <http://energyblockgrants.org/success-stories/>
3. EPA-DfE: Case studies are often included within the overall project document collection. They could be organized differently for easy retrieval (example at [http://www.epa.gov/dfe/pubs/lithography/case\\_studies/case2/lcasestudy2.html](http://www.epa.gov/dfe/pubs/lithography/case_studies/case2/lcasestudy2.html) )
4. EPA WasteWise: <http://www.epa.gov/epawaste/partnerships/wastewise/success.htm>
5. EPA Lean Manufacturing and the Environment case studies and best practices at <http://www.epa.gov/lean/studies/index.htm> . These documents are substantial project reports and much longer than the typical case studies reviewed here.
6. Success stories from the Green Suppliers Network:  
<http://www.greensuppliers.gov/results/success.html>
7. Many state departments of environment or university extension programs have small sets of case studies, such as: <http://www.wmich.edu/mfe/mrc/greenmanufacturing/projects-wmu.php> or <http://www.istc.illinois.edu/> (associated with GLPPR).
8. Department of Defense Sustainability Success Stories:  
<http://www.denix.osd.mil/sustainability/SuccessStories.cfm>. Individual branches of the military also have sites with case studies.

## Database Design and Presentation

The large case study databases offer slightly differing search features. Examples are provided below with a brief discussion of impressions following the individual database examples.

*P2Pays.org (North Carolina Division of Pollution Prevention and Environmental Assistance)*

<http://www.p2pays.org/ias/case.asp>

The main entry page (at right) includes a keyword search, but also links to searches using pull-down menus of concepts, including:

- SIC code/Industry Sector – approximately forty options based on the left four-digits of the SIC code.
- P2 Category – 17 P2 categories including, e.g., raw material recovery, alternative fuels, water conservation, etc.
- Waste streams, processes, pollutants (Figure 2) – 27 categories, including hazardous waste, energy, metal plating, etc.

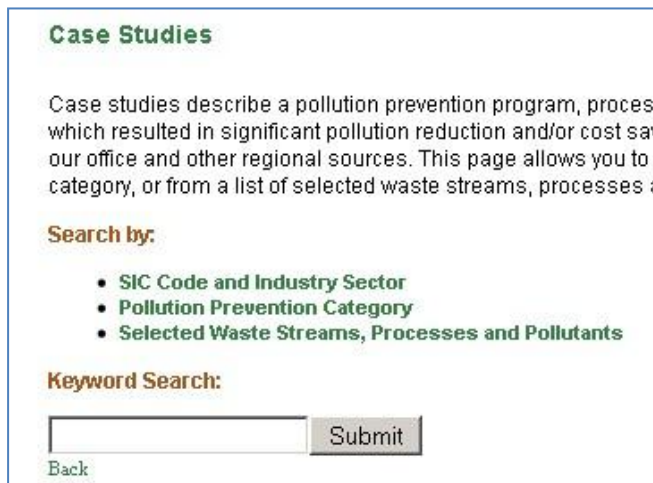


Figure 1 Main entry page to P2Pays case study database.

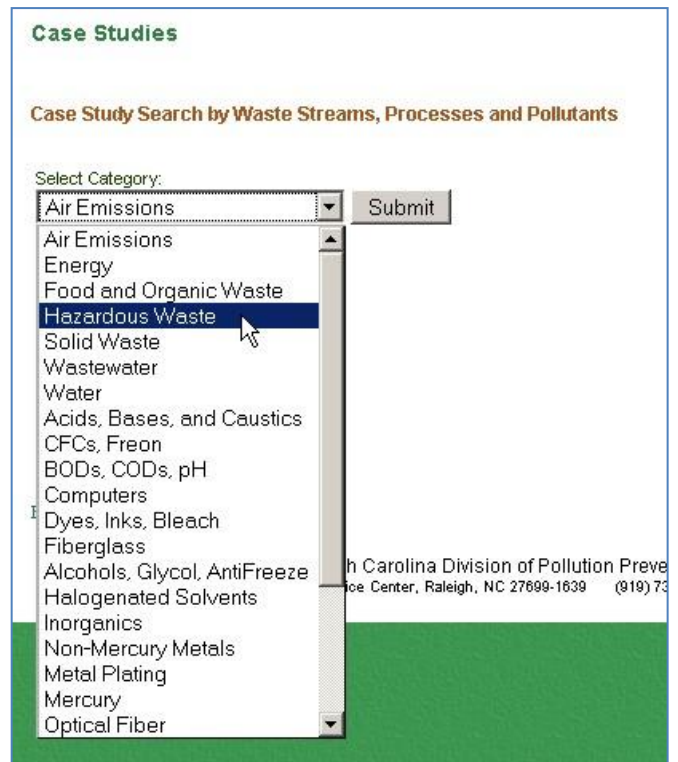


Figure 2 Sample of second level search available from links on the main entry page.

*Zero Waste Network Case Study Database*

<http://www.zerowastenetwork.org/success/>

The main entry page (at right, Figure 3) includes no keyword search, but has a large number of tags in several categories in pull-down menus:

- Industry General – dozens of options, e.g., cement manufacturing, laundry, wood products;
- Process Type – dozens of options, e.g., chemical production, facility heating cooling, machining;
- Waste Reduced – dozens of options, e.g., chlorine, hazardous waste, stack emissions;
- Company – companies identified in case studies
- State
- Regional Center – based on EPA region (0, 3, 6, 7, 8, 10);
- Year Submitted.

A keyword search box appears, but only after the results of a category based search. Multiple criteria can be combined in a single search and the criteria are displayed in a table of the final search results.

**Case Study Database**

[Add Story](#) | [Search Case Studies](#) |

**Welcome to Region 6 Success Stories Database**

Welcome the Zero Waste Network success story database. We currently have **504** success stories. Each case study is an example of how a real facility saved money, reduced waste, and/or lowered their regulatory burden through an innovative P2 practice. The studies are often written in a companies own words, with minimal editing. For more information on success story procedures see: [success story SOP's document](#).

Industry General :  
All

Process Type :  
All

Waste Reduced :  
All

Company :  
All

State :  
All

Regional Center :  
All

Year Submitted:  
All

Find Success Stories Clear Form

Figure 3 Zero Waste database search page.

*Hollings Manufacturing Extension Partnership*

<http://blue.nist.gov/sshome>

The main entry page (at right, Figure 3) includes a keyword search, but also category searches in pull-down menus:

- Center – categories for each of the MEP centers;
- Industry – 21 options, e.g., chemical, leather, printing;
- State
- District – intended to represent congressional district, but not fully implemented.

One one criterion can be selected in a single search, however, the results of these category search can be sorted by project year.

The screenshot shows a web page titled "Client Successes". Below the title is a paragraph of introductory text. A section titled "Search Client Successes Database" follows, with a brief description of the database. It lists two search methods: a keyword search and a search by category. The keyword search is implemented as a text input field followed by a "Search Successes" button. The category search is implemented as four stacked dropdown menus labeled "[select center]", "[select industry]", "[select state]", and "[select district]".

Figure 4 NIST MEP success story database.

*Envirowise - Sustainable Practices, Sustainable Profits*

<http://envirowise.wrap.org.uk/uk/Our-Services/Publications.html>

This is the only true database of studies identified outside the US, though it also includes other resources. It offers a keyword search, but also a list of check boxes for available tags that can be used to restrict search results. This is the most powerful search function identified among all the databases. Multiple check-box tags can be used with optional keywords in a single search; tag groups include:

- Area – region within the United Kingdom;
- Sector – 11 sectors including, e.g., chemicals, food and drink, hospitality & catering;
- Issue – 7 options including cleaner design, EMS, managing behaviour change, hazardous waste, packaging, waste management and water;
- Publication Type – benchmarking, case studies, FAQs, guides.

Home > Our Services > Publications

## Publications

Find:

You may also refine your search by any or all of the categories below:

**Area:**

England       Scotland       Northern Ireland       Wales

National

[Select All](#) | [Select None](#)

**Sector:**

Chemicals     Commercial     Construction                       Electronics

Engineering     Food & Drink     Furniture                               Hospitality & Catering

Printing         Retail             Public Sector (Wales & Scotland only)     All Sectors

[Select All](#) | [Select None](#)

**Issues:**

Water         Waste Management               Cleaner Design                       Packaging

EMS          Hazardous Waste                   Managing Behaviour Change

[Select All](#) | [Select None](#)

**Publication type:**

Benchmarking                       Case Studies                               FAQ                                       Guides

[Select All](#) | [Select None](#)

Figure 5 The Envirowise publications advanced search page.

## General Impressions of Database Search Capabilities

For large database collections, good search is essential. Some distinctive search features of the databases identified for this work are discussed below.

### *Envirowise Database*

- 1) **Keyword searching is available.** Not all the databases have keyword search capability.
- 2) **Keyword searches can be limited by multiple index criteria.** Keyword searching is essential, but being able to restrict results by industry, sector or issue (perhaps a “waste reduced” concept) seems very powerful if the database is large.
- 3) **Users can visually select multiple index criteria for some categories.** The need to scroll through a long list of choices via a pull-down menu can be frustrating. The Envirowise database offer the ability to VIEW many index search options in one glance. This is particularly valuable if multiple category search criteria are needed (and available). Pull-down menus can offer multiple selection, but it usually requires awkward keyboard-mouse coordination (e.g., control-key push while clicking). A visual check box display will become unwieldy if there are too many options available. Pull-down menus may be preferred where only one category selection is likely or the list of options is long.

### *Zero Waste Database*

The Zero Waste database also offers searches with multiple criteria, but the keyword search does not appear to be integrated with index term pull-down menus. Search results appear in a table that includes the key category index terms (Company, Process, Industry, Waste Reduced). This information is useful in learning how a database is structured and to help guide successive searches.

### *P2Pays Database*

P2Pays offers keyword search, but not together with other limiting criteria. The case study collection can also be queried one criterion at a time by (as described in the database design section above):

- SIC code
- pollution prevention category
- waste category

The P2Pays database offers SIC code combined with industry sector. SIC has been superseded by NAICS. While NAICS and SIC might be useful, their use seems necessary unless truly large numbers of facilities are indexed that would utilize the full detail NAICS system. Industry sector seems both more familiar and more practical for most users.

**Review of Case Study Design**  
**April 4, 2011**

**Introduction**

A variety of case studies were reviewed to consider elements of design, including energy efficiency, pollution prevention and lean studies. Even within a single collection, case studies have very mixed style and content. Most case studies have a broad scope, focusing on a number of improvements at one facility rather than focusing in detail on a single problem or solution.

Pollution prevention and energy assessments typically focus on a few, standard wastes or processes. As a result, case studies in these areas are readily characterized (i.e., categorized) by the process or types of wastes addressed and these are familiar to a broad audience (see table below). It also seems more likely that P2 and energy case studies can be used in facility-based improvement efforts without need for external expertise (do-it-yourself for facilities).

The Lean process tools and vocabulary are somewhat less accessible (e.g., Total Productive Maintenance, VSM, kanban, etc., also concepts of “floor space” or “lead-time”). Perhaps as a result, lean case studies are more likely to tell a story that, in addition to describing a set of unique solutions identified for a single facility, also must educate the reader on lean methodologies and frequently unacknowledged wastes. It seems less likely that any facility would attempt a lean initiative without external expertise or significant training in lean tools.

<b>P2 Results System Categories</b>	<b>Lean’s Seven Deadly Wastes</b>
Non-Hazardous Materials	Overproduction
Hazardous Materials	Inventory
Hazardous Wastes	Transportation
Air Emissions	Motion
Solid Waste	Defects
Energy	Over Processing
Green Energy	Waiting
Water Use	
Water Pollution	

**A Good Example of Case Study Design – Energy Efficiency at J.R. Simplot**

<http://www1.eere.energy.gov/industry/saveenergynow/pdfs/42788.pdf>

The J.R. Simplot case study offers a good basic design, but at four pages is on the long side. It offers a structure suitable to most energy, water and pollution prevention interventions. The table below includes the document sections and the description for a typical mid-length case study. Some sections are labeled “Optional” and may be omitted in shorter documents or to reduce size in longer documents.

<b>Section</b>	<b>Description</b>
----------------	--------------------

<b>Section</b>	<b>Description</b>
<b>Title</b>	<p>The title should help the reader identify relevant studies by including industry type, problem (e.g., hazardous waste) or improvement type (e.g., toxics reduction) and unique identifying name:</p> <ul style="list-style-type: none"> <li>• <i>Steam System Efficiency Optimized After J.R. Simplot Fertilizer Plant Receives Energy Assessment</i></li> </ul>
<b>Key Results and/or Benefits</b> (often in a sidebar or prominent first section)	<p><b>Optional</b> – includes highlights of key findings: annual cost savings, energy savings, hazardous waste reduced, increase in efficiency, etc. These are useful for promoting past successes and motivating on-going behavior change internally. These are usually repeats of information in the Results section and may not be directly relevant to future assessments at a different facility.</p>
<b>Summary</b>	<p><b>Optional</b> - A brief summary is often included. While many case studies include multiple problems or fixes and a brief summary can help the reader determine whether the document is on target for their situation. For shorter case studies or success stories (one to two pages), a summary is probably not necessary.</p>
<b>Company/Plant Background or Description</b>	<p>A description of the nature of the business, size of the facility, and the relevant technologies or processes.</p>
<b>Assessment Overview</b>	<p>Describe the nature of the activity or intervention and make-up of the team involved in the assessment process. The scale of resources required (time, team size, external parties, etc.) is likely very important to an organization considering a assessment.</p>
<b>Assessment Recommendations</b>	<p>Descriptions of the main recommendations for improvement. Typically one paragraph per improvement area.</p>
<b>Results</b>	<p>These can be estimates based on the assessment visit or actual results determined from follow-up visits made later. They may be categorized by process or by the type of waste reduced or efficiency improvement made. These should highlight the cost impacts as well as any benefits direct or indirect, e.g., less regulatory paperwork, GHG reductions, reduced hazardous waste, reduced raw material use, etc.</p>
<b>Lessons Learned</b>	<p><b>Optional</b> – This can include barriers to improvement identified, critical success factors, etc. While this can add a human element to the case study story or provide an opportunity to promote certain techniques or tools, lessons learned are likely of value primarily to the organization that participated in the assessment rather than for a future external reader.</p>
<b>Contacts/Resources</b>	<p><b>Optional</b> – These are critical to providing the reader with options to pursue their own improvements, but may not be needed where the case study database is housed at a website separately offering access to these services and resources. Older case studies in existing databases contain good improvement ideas, but plant and other contact information can quickly become obsolete.</p>

Section	Description
Keywords	<b>Optional</b> – While keywords do not need to be part of the case study output, it is useful to display them prominently in the search results. This helps train the database user in the vocabulary of the subject matter to better guide future searches.

### A Bare Bones Template

A minimum set of sections for a template could include a subset of the model template described above:

- **Title**
- **Company/Plant Background**
- **Assessment Overview**
- **Assessment Recommendations**
- **Results**

Many success stories and case studies use these basic sections. Examples of minimalist templates include:

- Toronto petroleum producer: [http://www.trsp.ca/TRSP\\_cs\\_Petroleum\\_Products.pdf](http://www.trsp.ca/TRSP_cs_Petroleum_Products.pdf)
- Miller Brewing Company: <http://www.p2pays.org/ref/07/06105.pdf>

### Templates for Lean Interventions

While the design above is suitable (and often used) for lean interventions, many lean case studies are presented as a narrative without a consistent structure:

- Alkota Cleaning Systems, Inc.: [http://www.dakotamep.com/?id=208&form\\_data\\_id=30](http://www.dakotamep.com/?id=208&form_data_id=30)
- Belden Brick Co.: <http://www.infor.com/content/casestudies/belden-brick.pdf/>
- Moen Inc.: [http://www.ies.ncsu.edu/\\_library/docs/moen\\_lean.cfm](http://www.ies.ncsu.edu/_library/docs/moen_lean.cfm)
- OMCO Company: <http://www.mep.purdue.edu/successes/stories/omco.pdf>
- Union Foundry Company:  
[http://www.auburnworks.org/news\\_and\\_publications/SOAR/Union%20Foundry%20SOAR%20072010.pdf](http://www.auburnworks.org/news_and_publications/SOAR/Union%20Foundry%20SOAR%20072010.pdf)

*A separate, lean-focused template design would be useful to meet the needs of sophisticated lean-process practitioners and to provide metrics for the distinct types of improvements made during lean initiatives.*

### Miscellaneous Template Forms & Suggestions

- Wisconsin Department of Natural Resources guidelines. This is a very detailed template design suitable for significant P2 assessments and contains table formats for material/energy balances and project cost/benefit analyses.  
<http://www.gypsymoth.wi.gov/org/caer/cea/publications/casestudy/guidelines.pdf>
- Zero Waste’s document on success story preparation:  
<http://www.zerowastenetwork.org/success/index.cfm/SuccessStoryGuidance.zip>
- A very detailed guide to one clearinghouse’s case study design is available in Appendix B of the EPA’s “International (Non-U.S.) Industrial Pollution Prevention: A Case Study Compendium,” EPA-820-R-94-005, August 1994 (available at <http://nepis.epa.gov> ).

- The Climate Wise Case Study Compendium: Report 1 – reports that a focus group developed suggestions for case study design to include: cost details, management approach and impetus for the project, community benefits, cross-industry applications, and process flow diagrams.  
[http://www.osti.gov/bridge/product.biblio.jsp?osti\\_id=446199](http://www.osti.gov/bridge/product.biblio.jsp?osti_id=446199)
- Texas Water Utilities Association P2 Success Story form:  
[http://www.twua.org/p2/Stories/browser\\_version.htm](http://www.twua.org/p2/Stories/browser_version.htm)

### **Additional Design Considerations**

The content and design of a case study template depend on the intended use and the customer or audience. Additional content or sections may be needed to meet specific goals. Prior to finalizing the template or database design, thought must be given to:

- **The Objective of Maintaining the Case Study Database** – Individual case studies are developed for a variety of motivations. A database collection is a resource that may also serve many purposes:
  - promoting corporate achievements, e.g., publicizing “green” behaviors,
  - vendors, suppliers or regulators publicizing technology or problem-solving capabilities, including hardware, services, or both,
  - documenting the success of projects, programs or organizational “interventions,” perhaps as part of a reporting requirement, or for tracking quantitative program results,
  - motivating change in corporate behavior or advancement of specific values, e.g., industrial competitiveness, environmental protection or use of management systems.
- **The Intended Customer**
  - Facility staff: These may be process engineers or EHS staff with specific compliance or process problems. They need, for example, to get the chromium out of their waste stream or to reduce their wastewater volume and are looking for specific solutions targeted at specific problems.
  - Technical service providers: These may use case studies as sources of ideas or solutions to problems identified by a client.
  - Facility leadership: These may be managers with concerns about overall profitability or with increasing energy or compliance costs. They need to affect change and are looking for broad facility-wide solutions or approaches.

While these points may not seem particularly profound, the key concept is that guidelines for new case studies or for re-tooling old case studies should keep the overall objectives of the collection and the audience in mind. Case study design will influence facilities’ views of the types of resources and the types of problem-solving approaches best suited to their needs. They can also educate facilities in the collateral environmental benefits and synergies between pollution prevention, lean and energy efficiency projects.

Appendix H. **Industry/Trade/Manufacturing Organizations for Possible Partnership**

**Industry/Trade/Manufacturing Organizations for Possible Partnership  
April 4, 2011**

**Search Strategy**

I was not able to find many industry affiliated sites with P2 or other case studies. To identify potential industry partners, I searched manufacturing and industry associations or affiliated organizations that had “significant” topic areas on competitiveness or environment. Industries well-represented in the DOE’s energy programs were given additional search attention.

Where possible, industry partners of the EPA-sponsored Industrial Compliance Centers (aka Compliance Assistance Centers) are also listed.

**Selected Compliance Center Industries**

<b>Industry/Organization</b>	<b>Contact Information</b>
<b><i>Aerospace</i></b>	
Aerospace Industries Association <a href="http://www.aia-aerospace.org/">http://www.aia-aerospace.org/</a>	1000 Wilson Boulevard, Suite 1700 Arlington, VA 22209 Media Contact: Alexis Allen, (703)358-1075 alexis.allen[at]aia-aerospace.org
<b><i>Paints/Coatings/Finishing</i></b>	
National Association for Surface Finishing <a href="http://www.nasf.org/AM/Template.cfm?Section=Home">http://www.nasf.org/AM/Template.cfm?Section=Home</a>	1155 Fifteenth Street, NW Suite 500 Washington, DC 20005 Phone: 202-457-8404 Fax: 202-530-0659
<b><i>Printing</i></b>	
Printing Industries of America <a href="http://www.printing.org/">http://www.printing.org/</a> See Green Guide and page on Lean	601 13th Street, NW Suite 350S Washington, DC 20005-3807 (202) 730-7970
<b><i>Chemical</i></b>	
Society of Chemical Manufacturers and Affiliates (SOCMA) <a href="http://www.socma.com/">http://www.socma.com/</a> See ChemAlliance and ChemSteward	1850 M Street NW, Suite 700 Washington, DC 20036-5810 Telephone: (202) 721-4100 Fax: (202) 296-8120
<b><i>Manufacturing</i></b>	

<b>Industry/Organization</b>	<b>Contact Information</b>
<p>National Center for Manufacturing Sciences  <a href="http://www.ncms.org/">http://www.ncms.org/</a>            See Sustainable Manufacturing page. The NCMS manages the Compliance Assistance Centers.</p>	<p>Bill Chenevert            General Manager, Educational Services            (734) 995-7989  <a href="mailto:billc@ncms.org">billc@ncms.org</a>             or NCMS East:            2029 K Street            7th Floor            Washington, DC 20006            Tel: (202) 822-5025            Fax: (202) 822-5023 -            Office Contact: Rebecca Taylor,  <a href="mailto:rebeccat@ncms.org">rebeccat@ncms.org</a></p>
<p>National Council for Advanced Manufacturing</p>	<p>2025 M Street, NW Suite 800            Washington, DC 20036            (202) 367-1178</p>
<b><i>Food Processing / Production</i></b>	
<p>Northwest Food Processors Association  <a href="http://www.nwfpa.org/">http://www.nwfpa.org/</a>            See the Innovation Productivity Center and the Knowledge Exchange. NWFPA is actively working with the Food Processors Compliance Assistance Center.</p>	<p>Northwest Food Processors Association            8338 NE Alderwood Road, Suite 160            Portland, OR 97220            Main Phone: 503.327.2200            Fax: 503.327.2201  <a href="mailto:info@nwfpa.org">info@nwfpa.org</a></p>
<p>American Meat Institute  <a href="http://www.meatami.com/">http://www.meatami.com/</a></p>	<p>1150 Connecticut Avenue, NW 12th Floor            Washington, DC 20036            202-587-4200 (main) · 202-587-4300 (fax)</p>
<b><i>Semiconductor</i></b>	
<p>SEMI - the global industry association serving the manufacturing supply chains for the microelectronic, display and photovoltaic industries.  <a href="http://www.semi.org/en/">http://www.semi.org/en/</a>            See Global Care initiative</p>	<p>SEMI Global Headquarters            San Jose            3081 Zanker Road            San Jose, CA 95134, USA            Tel: 1.408.943.6900            Fax: 1.408.428.9600            Email: <a href="mailto:semihq@semi.org">semihq@semi.org</a></p>

## Appendix D. P2Rx Factsheet: How P2Rx Can Work for You

### NETWORK BUILDING

REGIONAL ROUNDTABLES  
P2 PROGRAMS DIRECTORY  
WEBSITES  
LISTSERVS  
CONFERENCES  
WORKSHOPS  
WEBINARS  
CALENDAR  
LEAN & ENVIRONMENT  
WORKGROUP

### CONTENT

TOPIC HUBS™  
P2 NEWS  
INDUSTRY SECTOR RESOURCES  
P2 INFOHOUSE  
P2 EXPERTS  
RAPID RESPONSE RESEARCH  
VIDEO CLIPS  
CALCULATORS  
ARCHIVES

### OUTCOMES

CASE STUDIES  
SUCCESS STORY DATABASE  
AGGREGATION OF MEASURED  
P2 RESULTS

**Reducing waste, conserving resources, energy and water are achievable by integrating pollution prevention considerations into lean and energy strategies. Pollution prevention has proven to be a cost effective approach, and may be key to a positive public image for your clients and a marketing edge in a highly competitive market.**

### **Pollution Prevention Resource Exchange (P2Rx)**

P2Rx is a consortium of eight regional information centers that aggregate and deliver information on pollution prevention; lean and environment strategies and efforts; resource, water and energy efficiency; sustain-ability, curbing global warming; and related topics. If you are a lean service provider, environmental or energy professional or technical assistance provider, we can support your lean and environment/energy efforts through quick access to information and resources for opportunities to operate more efficiently. P2Rx resources include—

**Industry Factsheets and Checklists** Many of these field-tested documents are helpful in preparation for or during client visits, and can be left with clients. Find these using the search at [P2Rx.org](http://P2Rx.org) or at [p2pays.org/infhouse](http://p2pays.org/infhouse)

**Real-World Case Studies** Combined P2Rx case study databases contain over 700 searchable entries at [p2rx.org/new\\_home/case\\_studies.cfm](http://p2rx.org/new_home/case_studies.cfm)

**Sector Resources** Technical resource documents are organized by industry sector are available at [p2rx.org/new\\_home/sector\\_resources.cfm](http://p2rx.org/new_home/sector_resources.cfm)

**Pollution Prevention Topic Hubs™** Peer-reviewed, on-line primers include background and operational information plus detail opportunities for pollution prevention for specific industries or issues. They include an extensive list of links for the “best of the best” on-line resources: manuals, checklists, fact sheets, case studies, where to find “live” expertise, etc. Titles especially relevant to lean and environment include industry-specific hubs, the Lean and Environment hub, and the Environmental Measurement hub. Find the entire list at [p2rx.org/p2infonexpert/topichubs\\_2.cfm](http://p2rx.org/p2infonexpert/topichubs_2.cfm).

**Information at your fingertips—just a few examples:**

- [PPRC Facility Environmental Checklist for Lean Providers](#) can be used to effectively spotlight environmental wastes during facility walk throughs and lean events. Covers environmental policy, energy, fuel, water, toxics, waste, air quality, and storm water. [pprc.org/solutions/Lean\\_Green\\_facility\\_checklist\\_4\\_10\[1\].pdf](http://pprc.org/solutions/Lean_Green_facility_checklist_4_10[1].pdf)
- [Spray paint options factsheet](#) provides information on the strengths and weaknesses of five technology options. [glrppr.org/topichubs/pdfs/98-048.pdf](http://glrppr.org/topichubs/pdfs/98-048.pdf)
- Real world case studies indexed in searchable databases describe opportunities found, actions taken and outcomes realized, e.g. in [Woodfold Mfg., Inc. - 1997 Case Study](#), this company worked with [Oregon Manufacturing Extension Partnership](#) and PPRC to identify and implement environmental improvements during a value stream mapping (VSM) exercise. One of the opportunities for this company was spray paint efficiency improvement. STAR training, provided by PPRC helped them improve paint transfer and build efficiency and reduce material cost and waste. [pprc.org/star](http://pprc.org/star).

## CENTERS

NEWMOA  
(EPA Regions 1-2)  
Boston, MA 02114-2014  
617-367-8558 /  
[www.newmoa.org](http://www.newmoa.org)

Environmental Sustainability  
Resource Center  
(EPA Regions 3-4)  
Raleigh, NC 27699-1639  
800-763-0136/  
[www.p2pays.org](http://www.p2pays.org)

Great Lakes Regional Pollution  
Prevention Roundtable  
(EPA Region 5)  
Champaign, IL 61820  
217-333-8946  
[www.istc.lillinois.edu](http://www.istc.lillinois.edu)

Zero Waste Network  
(EPA Region 6)  
Austin, TX 78759  
512-904-2287  
[www.zerowastenetwork.org](http://www.zerowastenetwork.org)

Pollution Prevention Regional  
Information Center  
(EPA Region 7)  
University of Nebraska  
Omaha, NE 68106  
402-554-6251  
[www.p2ric.org](http://www.p2ric.org)

Peaks to Prairies  
(EPA Region 8)  
Montana State University  
Extension  
Bozeman, MT 59717-3580  
406-994-6948  
[peakstoprairies.org](http://peakstoprairies.org)

Western States Pollution  
Prevention and Sustainability  
Network  
(EPA Region 9)  
Reno, NV 89511-5225  
775-689-6678 /  
[www.wsppn.org](http://www.wsppn.org)

Pacific Northwest Pollution  
Prevention Resource Center  
Seattle, WA 98101  
206-352-2050  
[www.pprc.org](http://www.pprc.org)

**Rapid Response Research Services** P2Rx centers offer rapid, individual assistance for questions relating to pollution prevention. This service is useful in identifying environmental improvement opportunities for an industry, finding less toxic alternatives, and answering other challenging questions. Submit questions at [p2rx.org/services/rapidresponse.cfm](http://p2rx.org/services/rapidresponse.cfm)

**Lean and Environment Workgroup** Network with peers who are working to expand the knowledge, skill sets, and assistance capabilities of lean and environment partnerships. This is a joint effort of two P2Rx centers and the National Pollution Prevention Roundtable. Find out more and how to join at [www.p2.org/workgroups/lean-p2/](http://www.p2.org/workgroups/lean-p2/)

**Environmental Savings Calculators** Find links to calculators in the environmental measurement topic hub at [p2rx.org/topic hubs/index.cfm?page=subsection&hub\\_id=1000&subsec\\_id=15](http://p2rx.org/topic hubs/index.cfm?page=subsection&hub_id=1000&subsec_id=15).

**Webinars & Trainings** Webinars and various trainings are routinely offered by P2Rx centers. Repeat training offerings by different centers include spray paint efficiency (STAR) and NESHAP training, Environmental Management System and/or Pollution Prevention Workshops, Green Team Trainings, and more. Webinars cover timely topics relevant to pollution prevention efforts. Find upcoming events on the P2Rx calendar, along with archived webinars. Also, for pollution prevention topics, P2Rx may be available to host webinars. P2Rx Calendar at [p2rx.org](http://p2rx.org) has archived webinars at [p2rx.org/new\\_home/webinars.cfm](http://p2rx.org/new_home/webinars.cfm)

- Find pollution prevention activities, events, webinars, etc. at [p2rx.org](http://p2rx.org) and Environmental Calendars at individual P2Rx center sites – such as [wsppn.org/webinar/](http://wsppn.org/webinar/)
- The National P2 Results Data System provides an efficient and effective way for analyzing and presenting aggregate results of P2 efforts conducted in various regions of the U.S., or the entire U.S. [p2rx.org/services/measurement.cfm](http://p2rx.org/services/measurement.cfm)
- **The Energy & Materials Flow & Cost Tracker (EMFACT™)** is a software tool that applies environmental management accounting to track and quantify materials and energy use, releases, discharges, wastes, products, and associated costs. [newmoa.org/prevention/emfact/](http://newmoa.org/prevention/emfact/)

**FOR MORE  
INFORMATION  
visit [P2Rx.org](http://P2Rx.org)**



March 17, 2011

## Appendix E. Coordinator Transition Document

### Work

Transition from old to new national coordinator (1-3 months)

NPPR National Summit planning/participation

- NPPR summit planning calls (months before event)
- Social media (each center) and news/newsletters (those who do them)
- Media sponsorship outline for P2Rx (Greg Geyer email): fixed costs for meeting & display space; cross-promotion via ads, calendars, news
  - Meeting space; side space for exercise, walks, activities; display table
- Advertising Summit event on P2Rx Center websites, social media
- P2Rx session/focus group opportunity (offer something for summit attendees)
- NPPR workgroup support/participation. (Most P2Rx centers are involved in one or more.)
- Coordinator serves as Summit planning liaison (involve centers less in direct conf. calls). Also: stronger organization/communication from conference organizing consultant
- (Possible) P2Rx annual meeting – side meeting to Summit
- Meet with EPA P2 Coordinators
- NPPR and P2Rx side meetings /strengthen opportunities with candidate key partners (e.g., Scott Hutchings / US DOE)
- P2Rx presentation to NPPR Board
- P2Rx display table: display, brochures, candy handouts, business cards
- Center staff on presentation panels
- Paula and Thomas ran a workgroup. I think all centers were involved with workgroup meetings.

# Summary of on-going P2Rx National Coordinator Activities, Including Some Marketing Responsibilities

## GENERAL NOTES

Useful documents to routinely consult: (see links in table below)

- Marketing implementation plan
- Prior quarterly reports
- Prior semi-annual reports

P2Rx marketing & promo materials:

- P2Rx tabletop conference display is (as of Jan. 2011) currently at PPRC. Center that's just used it holds it until its needed next. Whoever has it pays postage to get it to next place.
- PPRC S drive has
  - Topic hub promo flyer templates This is being modified (I hope). I assume that you will include documents and templates on a flashdrive.
  - P2Rx promo/marketing materials for May 2010 NPPR meeting (bookmarks, etc.) Once again, should include on flashdrive.
  - Center logo files (some) same comment

## MONTHLY TASKS

*(Items in the green boxes have traditionally been done by the Coordinator's staff)*

TIME	TASK	GUIDANCE
Ongoing / As-Needed		
	Google Group communications: used for Admin Group & Webbies communications	For guidance on joining/maintaining Google groups, see emails from Laura Barnes April 2010
Ongoing / As-Needed	<p>Organize/facilitate P2Rx sub-committee calls &amp; work as needed.</p> <p>Standing committees are:</p> <ul style="list-style-type: none"> <li>• Executive Committee</li> <li>• Administrative Group</li> <li>• Web Group</li> <li>• Marketing and Partnering Committee</li> <li>• Content and Technology Committee</li> </ul> <p>Temporary committees (as of Jan. 2011):</p> <ul style="list-style-type: none"> <li>• Sustainability (mainly NING discussion at present)</li> <li>• Energy efficiency (seeking partnerships for E2 &amp; climate change issues)</li> </ul> <p>The coordinator works with the committee chairpersons to set up calls, form the agenda, and take and post minutes to the P2Rx website. (Exception: Marketing Committee. Currently Rachel Smith/NEWMOA takes notes &amp; posts them)</p> <p>Update update/maintain website lists of committee members.</p> <p>Consider adding temp subcommittee info @ website, too.</p> <p>Committee chair appointments are not defined. The last one to be</p>	<p>Most standing committees have conference call dates/numbers, minutes and other documents posted on the P2Rx administrative page <a href="http://p2rx.org/admininfo/toc.cfm">http://p2rx.org/admininfo/toc.cfm</a>.</p> <p>Marketing strategy and plan documents (2009) are posted under "adopted standards" at <a href="http://p2rx.org/admininfo/toc.cfm">http://p2rx.org/admininfo/toc.cfm</a></p> <p>S Drive file S:\Projects\P2Rx Coordinator 2010-11\contacts has list of committee members &amp; email addresses</p>

	<p>appointed was the marketing chair. Donna Walden volunteered. I suggested that a chair was needed during one of the calls. I asked if there was anyone else interested (probably should have been done by email). Then the group did a voice vote. Jean and I both feel that a vote is a good idea for chairs. Terms of office are also undefined. Rick is the Chair of the Content and Technology Committee. He does a good job.</p> <p>Annually, the marketing committee will need to review the products according to the schedules set out in the P2Rx Marketing Implementation Plan,  <a href="http://p2rx.org/admininfo/markpartcom/p2rxmarketingplan1-10.xls">http://p2rx.org/admininfo/markpartcom/p2rxmarketingplan1-10.xls</a></p>	
<p>Quarterly, based on grant start date</p>	<p>Quarterly report is submitted to Beth. Check past formats to use if desired.</p> <p>NOTE: The timing of the Coordinator's report is based on Coordinator's grant/cooperative agreement. It has nothing to do with the timing of the semi-annual report which is a January, July submittal to EPA.</p>	
<p>Ongoing / As-Needed</p>	<p>Provide web maintenance, support, updating</p> <ul style="list-style-type: none"> <li>• <u>P2Rx website:</u> <ul style="list-style-type: none"> <li>○ <b>P2 content and links</b> provided to clients. <ul style="list-style-type: none"> <li>▪ Topic Hub database</li> <li>▪ P2 Programs Directory</li> <li>▪ P2 News</li> </ul> <p style="color: red;">Maintained with/by web committee members; facilitated by coordinator.</p> <p>Notification re: document to post: goes to center working on that topic hub (if any), and a copy to P2 Info House <span style="color: red;">explain further?</span></p> </li> <li>○ <b>Administrative pages</b> that contain minutes, standards, Coordinator reports, user manuals, marketing materials and other information for the Centers.</li> </ul> </li> <li>• <u>US EPA P2Rx website</u>  <a href="http://www.epa.gov/p2/pubs/p2rx.html">http://www.epa.gov/p2/pubs/p2rx.html</a>  <a href="http://www.epa.gov/opptintr/p2home/pubs/grants/ppin/factsheet.htm">http://www.epa.gov/opptintr/p2home/pubs/grants/ppin/factsheet.htm</a>  &gt;  <a href="http://www.epa.gov/opptintr/p2home/pubs/grants/ppin/ppin.htm">http://www.epa.gov/opptintr/p2home/pubs/grants/ppin/ppin.htm</a>  Watch for occasional need to update contact info, logos &amp; descriptions here.  Starting with P2Rx national coord, no longer Madeline after ____ 2011.  <i>Comment from Jean 2010.</i>  Turnover among web personnel within the Centers is relatively large. Many Centers use students or other part-time people to maintain their websites. This is the primary reason we have tried to centralize so much of the web content. Centralization makes it much easier for Centers (and partners) to display these products. Updating the products is also much easier and straight-forward, using web forms. Even with this documentation, there is the need for Center web personnel to ask questions. All the web personnel have quarterly</li> </ul>	<p>User manuals for Topic Hubs and Programs Directory are located on the administrative page of P2Rx.</p> <ul style="list-style-type: none"> <li>• The Topic Hub user manual is at <a href="http://p2rx.org/admininfo/UserManual/Creating_new_Topic_Hub.pdf">http://p2rx.org/admininfo/UserManual/Creating_new_Topic_Hub.pdf</a>.</li> <li>• The Programs Directory manual is at <a href="http://p2rx.org/admininfo/usermanual/ProgramsAdminManual.htm">http://p2rx.org/admininfo/usermanual/ProgramsAdminManual.htm</a>.</li> </ul> <p>See monthly task notes below for more info.</p> <p>Re: P2Rx website updates:  <b>PPRC S drive filenames</b>  web updates 2010.zip(2MB)  p2rx web updates 2-2010.docx(17KB)</p> <p>Re: US EPA P2Rx website updates:  contact Teodoro (Teddy) Gelebert  <a href="mailto:Gelabert.Teddy@epamail.epa.gov">Gelabert.Teddy@epamail.epa.gov</a></p>

	conference calls but they also need someone to call at any time.	
	To archive information on the Admin page, work through the Technology and Content Committee to decide what an appropriate time frame is. The IT contractor moves the materials into the Archive. <ul style="list-style-type: none"> <li>• Good project to go through &amp; archive (e.g., web trends) (consider reviewing use/content of admin pages, improving user-friendly approach) !</li> </ul>	
<b>January</b>		
2x/yr	Semi-annual measures report to EPA <i>NOTE: semi-annual report relates to Center reporting, not coincident w/ quarterly reports for EPA P2 Coordinators</i> <ul style="list-style-type: none"> <li>• Solicit semi-annual measures from all centers: July-Dec preceding year. Heads-up messages to centers in late Dec. and (2x) early Jan.; center data due to coord. by mid-Jan.</li> <li>• Centers should include web user feedback survey data <ul style="list-style-type: none"> <li>○ ESRC, WSPPN, Peaks, PPRC, and Zero Waste have user feedback surveys administered through P2RIC Survey Monkey account <ul style="list-style-type: none"> <li>▪ National coord. looks up feedback for each of these centers' surveys; sends raw data to them; they summarize &amp; include it in their reports.</li> </ul> </li> <li>○ NEWMOA, GLRPPR, and P2RIC look up their own user survey data.</li> </ul> </li> <li>• Coord. prepares report aggregating the numbers and reporting the results to EPA. <ul style="list-style-type: none"> <li>○ For July-Dec report, include columns showing Jan-June data and consolidated annual numbers for all of preceding year.</li> <li>○ Submit report to ____ at EPA; cc all centers</li> <li>○ Use IT contractor to post to admin site</li> </ul> </li> </ul>	PPRC S drive filenames <a href="#">summary.xlsx(73KB)</a> <a href="#">P2Rx Web Numbers Oct-Dec 09.xls(23KB)</a>
Monthly	Set agenda for admin call; send reminder one week in advance <ul style="list-style-type: none"> <li>• Remind Centers of activities contained in the Marketing Implementation Plan</li> <li>• Activities for the current month and subsequent month are included in monthly call agendas.</li> </ul> Conduct admin call (second Wednesday at 2:00pm ET) <ul style="list-style-type: none"> <li>• Take minutes</li> <li>• Send minutes to NEWMOA (currently Nate) to post</li> <li>• Send US EPA regional coordinators notice that minutes are up</li> </ul>	Marketing Implementation Plan <a href="http://p2rx.org/admininfo/markpartcom/p2rxmarketingplan1-10.xls">http://p2rx.org/admininfo/markpartcom/p2rxmarketingplan1-10.xls</a> .  Online Admin group call minutes <ul style="list-style-type: none"> <li>○ Link to online minutes</li> </ul>
Monthly	US EPA regional P2 coordinators call (for EPA employees, not P2Rx centers): 3 <sup>rd</sup> Thurs. of every month. Organized by US EPA. Contact person = Michelle Amhaz (HQ/D.C.) <ul style="list-style-type: none"> <li>• National coord. listens to call, participates for one segment highlighting P2Rx.</li> <li>• One week after each call: phone Michelle to suggest topic for next coord. call. Examples: <ul style="list-style-type: none"> <li>○ Let another P2 center lead discussion for a particular topic (Example: discuss climate change topic hub; learn</li> </ul> </li> </ul>	

	<p><i>how topic hubs are created)</i></p> <ul style="list-style-type: none"> <li>○ Highlight opportunities for EPA P2 coord. to contribute &amp; use P2Rx more</li> <li>● Center &amp; National coord. discuss presentation beforehand to be sure messaging is on target</li> </ul>	
Monthly	Check links and distribute results for Topic Hubs	<p>The link-checking procedures are posted at <a href="http://p2rx.org/admininfo/LinkChecks-P2Rx.pdf">http://p2rx.org/admininfo/LinkChecks-P2Rx.pdf</a>.</p> <p>PPRC S drive filenames</p> <p>Procedure to fix broken links.docx(1005KB)</p> <p>Check (add if necc.) Jean's advice from emails to Cathy</p>
Monthly	Check links and distribute results for Programs Directory	<p>The link-checking procedures are posted at <a href="http://p2rx.org/admininfo/LinkChecks-P2Rx.pdf">http://p2rx.org/admininfo/LinkChecks-P2Rx.pdf</a>.</p> <p>PPRC S drive filenames</p> <p>Procedure to fix broken links.docx(1005KB)</p> <p>P2 Programs Directory User Manual.docx(1MB)</p> <p>Check (add if necc.) Jean's advice from emails to Cathy</p>
Monthly	Check web user feedback forms and distribute results.	<p>Add links, guidance from Jean &amp; Ora / Cathy's emails</p> <p>PPRC S drive filenames</p> <p><a href="#">summary.xlsx(73KB)</a></p> <p><a href="#">P2Rx Web Numbers Oct-Dec 09.xls(23KB)</a></p>
<b>February</b>		
	<p>Plan for annual NPPR Env'l Summit</p> <p>List of expectations based on past:</p> <ul style="list-style-type: none"> <li>P2Rx = media sponsor; pushes out info on summit; had a display table at discounted rate</li> <li>Marketing materials need to be updated &amp; ready – incl. P2Rx brochure &amp; topic hub flyers &amp; handouts like chocolate kisses, bookmarks (attach examples / artwork)</li> </ul> <p>Seek out opportunities to meet with others as a group: e.g., US EPA regional coordinators; Scott Hutchins DOE</p>	
Annual	P2Rx annual meeting	
Monthly	P2Rx Admin group call (second Wednesday at 2:00pm ET)	See notes @ January
Monthly	US EPA regional P2 coordinators call: 3 <sup>rd</sup> Thurs. of every month.	See notes @ January
Monthly	<p>Check links and distribute results for Topic Hubs</p> <p>Check links and distribute results for Programs Directory</p> <p>Check feedback forms and distribute results</p>	See notes @ January

<b>March</b>		
Monthly	P2Rx Admin group call (second Wednesday at 2:00pm ET)	See notes @ January
Monthly	US EPA regional P2 coordinators call: 3 <sup>rd</sup> Thurs. of every month.	See notes @ January
Quarterly	Set agenda for web group call; send reminder three weeks and one week in advance Conduct web call (fourth Thursday at 12:00 noon ET); post minutes	
Monthly	Check links and distribute results for Topic Hubs Check links and distribute results for Programs Directory Check feedback forms and distribute results	See notes @ January
<b>April</b>		
(right timing?)	Check with centers: continue with Sept. 2010 decision to have an online P2Rx calendar, and (replacement) collateral materials to pass out to others? Recc. that calendar/collateral materials be ready in time for Fall regional roundtable season (i.e., ready by late Aug./early Sept.) <i>Advice below from Jean /</i>  Past advice for print calendar: The coordinator solicits photographs from the P2 community, typically in July. The environmental dates that are included in the calendar need to be confirmed for the next year. The side-bars that Centers provide must be solicited at least one month before they are needed. In 2010, Centers should query their clients to whom they provided calendars in 2009, to see how many they want in 2010 and to see if the calendar is meeting its product goals. The statements specific to the calendar from the Needs and Evaluation assessment should be used.	
Monthly	P2Rx Admin group call (second Wednesday at 2:00pm ET)	See notes @ January
Monthly	US EPA regional P2 coordinators call: 3 <sup>rd</sup> Thurs. of every month.	See notes @ January
Monthly	Check links and distribute results for Topic Hubs Check links and distribute results for Programs Directory Check feedback forms and distribute results	See notes @ January
<b>May</b>		
Monthly	P2Rx Admin group call (second Wednesday at 2:00pm ET)	See notes @ January
Monthly	US EPA regional P2 coordinators call: 3 <sup>rd</sup> Thurs. of every month.	See notes @ January
Monthly	Check links and distribute results for Topic Hubs Check links and distribute results for Programs Directory Check feedback forms and distribute results	See notes @ January
<b>June</b>		
Monthly	P2Rx Admin group call (second Wednesday at 2:00pm ET)	See notes @ January
Monthly	US EPA regional P2 coordinators call: 3 <sup>rd</sup> Thurs. of every month.	See notes @ January
Quarterly	P2Rx web group call (fourth Thursday at 12:00 noon ET)	See notes @ March
Monthly	<ul style="list-style-type: none"> <li>• Check links and distribute results for Topic Hubs</li> <li>• Check links and distribute results for Programs Directory</li> <li>• Check feedback forms and distribute results</li> </ul>	See notes @ January
<b>July</b>		
2x/yr	Semi-annual report to EPA	See notes @ January

Monthly	P2Rx Admin group call (second Wednesday at 2:00pm ET)	See notes @ January
Monthly	US EPA regional P2 coordinators call: 3 <sup>rd</sup> Thurs. of every month.	See notes @ January
Monthly	<ul style="list-style-type: none"> <li>• Check links and distribute results for Topic Hubs</li> <li>• Check links and distribute results for Programs Directory</li> <li>• Check feedback forms and distribute results</li> </ul>	See notes @ January
<b>August</b>		
Monthly	P2Rx Admin group call (second Wednesday at 2:00pm ET)	See notes @ January
Monthly	US EPA regional P2 coordinators call: 3 <sup>rd</sup> Thurs. of every month.	See notes @ January
Monthly	<ul style="list-style-type: none"> <li>• Check links and distribute results for Topic Hubs</li> <li>• Check links and distribute results for Programs Directory</li> <li>• Check feedback forms and distribute results</li> </ul>	See notes @ January
<b>September</b>		
Monthly	P2Rx Admin group call (second Wednesday at 2:00pm ET)	See notes @ January
Monthly	US EPA regional P2 coordinators call: 3 <sup>rd</sup> Thurs. of every month.	See notes @ January
Quarterly	P2Rx web group call (fourth Thursday at 12:00 noon ET)	See notes @ March
Monthly	<ul style="list-style-type: none"> <li>• Check links and distribute results for Topic Hubs</li> <li>• Check links and distribute results for Programs Directory</li> <li>• Check feedback forms and distribute results</li> </ul>	See notes @ January
<b>October</b>		
Monthly	P2Rx Admin group call (second Wednesday at 2:00pm ET)	See notes @ January
Monthly	US EPA regional P2 coordinators call: 3 <sup>rd</sup> Thurs. of every month.	See notes @ January
Monthly	<ul style="list-style-type: none"> <li>• Check links and distribute results for Topic Hubs</li> <li>• Check links and distribute results for Programs Directory</li> <li>• Check feedback forms and distribute results</li> </ul>	See notes @ January
<b>November</b>		
Monthly	P2Rx Admin group call (second Wednesday at 2:00pm ET)	See notes @ January
Monthly	US EPA regional P2 coordinators call: 3 <sup>rd</sup> Thurs. of every month.	See notes @ January
Monthly	<ul style="list-style-type: none"> <li>• Check links and distribute results for Topic Hubs</li> <li>• Check links and distribute results for Programs Directory</li> <li>• Check feedback forms and distribute results</li> </ul>	See notes @ January
<b>December</b>		
Monthly	P2Rx Admin group call (second Wednesday at 2:00pm ET)	See notes @ January
Monthly	US EPA regional P2 coordinators call: 3 <sup>rd</sup> Thurs. of every month.	See notes @ January
Quarterly	P2Rx web group call (fourth Thursday at 12:00 noon ET)	See notes @ March
1x/yr	<ul style="list-style-type: none"> <li>• Reserve conf. call lines for next year's admin and webbie calls.</li> <li>• Send list of call dates/numbers/times to NEWMOA, to post on internal admin site for ea. group.</li> <li>• Send notice to admin group &amp; webbies for their calendars</li> </ul>	See <a href="http://p2rx.org/webcall/getadmingroup.cfm#nextadmincall">http://p2rx.org/webcall/getadmingroup.cfm#nextadmincall</a> for call list format on P2Rx internal admin website
monthly	<ul style="list-style-type: none"> <li>• Check links and distribute results for Topic Hubs</li> <li>• Check links and distribute results for Programs Directory</li> <li>• Check feedback forms and distribute results</li> </ul>	See notes @ January

## Appendix F. Coordinator Review

### **P2Rx Coordinator Survey Results - Comments Sections**

**Please rate the following administrative services from most important to least important. Check NA for services that you do not consider the responsibility of the Coordinator.**

**Comments:**

There's a leadership quality that is missing here. As written, this could be administrative support person, and when we did that once, it was a disaster.

I think the most important thing Madeline has done this year is to identify and work with centers on exploring new opportunities. I tend to think of all of these services as the means, I am more concerned with the result. Statistics for what? Subcommittee meetings to do what? For example, I see massive improvement in the marketing committee and think the administrator is partly responsible for this.

**Please rate the performance of the current Coordinator on administrative functions.**

**Comment:**

The loss of the calendar without having something to replace it means we don't have the paper presence we did previously.

**Please rank the following list of outreach activities from 1-7. Enter 1 for the most important ranking down to 7 as the least important. Only one check per column will be accepted. Check NA for tasks that you do not consider to be part of the Coordinator's responsibilities.**

**Comment:**

representing well also promotes - these seem redundant so I deemed promoting P2Rx as N/A. Had it been promoting P2, however....

**Please rate the performance of the current Coordinator on outreach tasks.**

**Comment:**

Did a great job engaging EPA, particularly through the Coordinators' calls. We could have benefited from more follow-up on decisions and action items and more communication about the status of outstanding items. Granted, there is some shared responsibility of the full group in this regard, but setting and following through on action plans is an important function of the coordinator. Individual centers are responsible for regional coordinator, but, getting us on their agenda was a good move. Finding other groups to advocate and support us is also a bold step forward that I hope continues with NPPR.

**How would you rate the current Coordinator's performance on partnership development tasks?**

**Comment:**

Little lower because no new funding has arrived...this is a high bar for expectations.

**Please rate the following IT services in order of importance to your center. Check NA if the service does not apply to your center.**

**Comment:**

I think we've still done some link checking for centers...

**Please provide a detailed description of in-house IT support at your center. Include level of funding for IT support at your center.**

**Comments:**

Roughly 1/3 of an FTE.

Zac @ the attic. Zac is matched in and we pay for a portion of a student. I'm guessing it's all ~ \$20k. As I said in Seattle, with Tyler gone, and Nate's time under demand, we ought to figure out how to work together to best leverage our resources.

0.5 FTE for in-house IT support. Also have University IT support for hosting and list-serv issues. We had a strong IT in our center, but recently lost our web person. The level of IT support for the future is unknown right now, I will appreciate any help provided by the P2Rx network.

Not much support needed as we have been focused more on adding content instead of tools. However, we budgeted 10k to upgrade Case Studies and P2Options.

Have a full time LAN manager who oversees the Division's network and provides web support. This includes the P2Rx portion of the website. P2Rx provides 10% or about \$5,000 for salary.

**Please rate IT support provided by the Coordinator's team.**

**Comments:**

We are biased.

I don't think our needs are as great as other centers

Support staff does a great job with their limited time, but we could use more support